

Match level	Resident
Individual	Determines whether two records are for the same person. The Match transform compares the first name, last name, and address data. A match means that the two records represent the same person.

The preceding Hierarchical Levels of Matching could be extended into even more restrictive levels as listed in the following table.

Table 33: More Restrictive Hierarchical Levels of Matching

Match level	Resident
Firm	Determines whether two records reflect the same firm. This match type involves comparisons of firm and address data. A match means that the two records represent the same firm.
Firm-Individual	Firm-Individual Determines whether two records are for the same person at the same firm. This match type compares the first name, last name, firm name, and address data. A match means that the two records reflect the same person at the same firm.

Alternate forms of match level criteria can also be defined. For example:

- Family-level match criteria based on family (last) name and telephone number.
- Individual-level match criteria based on: Social Security Number (SSN) or identification number and full name or full name and account number.
- Firm-level match criteria based on firm name.
- Industrial Classification (SIC) Code or firm name and Data Universal Numbering System (DUNS) number.

Match criteria

Match criteria refers to the fields you want to match on. You can use criteria options to specify business rules for matching on each of these fields. Match criteria allow you to control how exact data must be for the data to be considered a match.

For example, you may require first names to be at least 85% similar, but also allow a first name initial to match a spelled-out first name, and allow a first name to match a middle name.

Break groups



Break Group Benefits and Considerations

- Controlling the number of record comparisons in the match process is important for a couple of reasons: